Job Aid 14
Business Case for Planning Phase

This job aid is a template that you can use to help write a business case to justify the planning phase for your migration or upgrade pilot project.

Target Audience:

- *Board Members*

Level:

- *Non-Technical*
- *Outline*

References:

Any background documentation on issues with previous mail system

Business case for adopting Exchange 2000.

Introduction

The (name) organization has been using (mail system) for the last (number) years. While (mail system) has been adequate for the organization's messaging needs up to now, changes in (working methods/operational requirements/business model) means that the company is planning to migrate to Exchange 2000.

Aim

The aim of this document is to secure management support for the planning of a pilot implementation of Exchange 2000.

Background

As indicated in the reference documents above, (mail system) is now proving to be a barrier to changes in operation practice due to the following limitations:

- Limitation One
- Limitation Two
- Limitation Three

Microsoft Exchange 2000 can overcome all of these limitations and is currently the preferred choice of replacement messaging system. In addition, it will bring the following extra benefits:

- Benefit One
- Benefit Two
- Benefit Three

Pilot Trial

It is proposed to run a pilot testing procedure to establish the following:

- Ensure that Exchange 2000 can operate as planned.
- Confirm the benefits listed above will be useable.

- Calculate and mitigate the risks associated with the migration process.
- Demonstrate the effectiveness of the user training program.
- Prove the viability of the migration process.

It is also proposed that the pilot system be suitably specified so that it can be migrated to become the production mail servers for Exchange 2000. This will provide the following advantages:

- It will significantly reduce the risk to the organization from the migration process
- It will allow for an extended trial and familiarization timetable
- Any unexpected migration issues will not bring down the current messaging system down.
- The users will not be affected by installation problems.
- It allows isolation of the pilot and production mail systems.

For these reasons, it is proposed that a pilot implementation be implemented and that this pilot system be migrated to the production environment.

Planning the Pilot

An essential part of this process is the planning of the pilot, which will (1) week(s) and will involve the following personnel:

- IT Director
- Network Manager
- Technicians
- Helpdesk Manager
- Departmental Heads
- Office Managers

A full management briefing on the pilot and migration process will be presented by (IT Director or Network Manager) during the week of (dates) once the plans are complete.

Planning Request

The board is requested to grant permission for this planning phase to go ahead and for the allocation of necessary resources for the creation of the pilot plan.

(Name)
Network Manager
(Organization Name)

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This is a preview edition of the Microsoft Exchange 2000 Server Upgrade Series. The final documentation will be available in November 2000.